



THE CITY OF SAN DIEGO



Organizational Support Program (OSP) Description and Requirements for FY15

Interim Mayor, City Council, Commissioners and Staff

Interim Mayor

Todd Gloria

City Council Offices

District 1: Council President Pro Tem Sherri Lightner

District 2: Kevin Faulconer

District 3: Council President Todd Gloria

District 4: Councilmember Myrtle Cole

District 5: Councilmember Mark Kersey

District 6: Councilmember Lorie Zapf

District 7: Councilmember Scott Sherman

District 8: Councilmember David Alvarez

District 9: Councilmember Mart Emerald

Commissioners

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Larry Baza

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Teresa Monillas, Contracts Coordinator

Linda Sokol, Executive Secretary

The City of San Diego Commission for Arts and Culture receives financial support for some of its programs from the National Endowment for the Arts and the California Arts Council.

All of the topics below are links to the place in this document where that topic is discussed.

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THE COMMISSION FOR ARTS AND CULTURE

Mission Statement

The mission of the City of San Diego Commission for Arts and Culture is to vitalize the community by integrating arts and culture into community life, supporting the region's cultural assets, and showcasing San Diego as an international cultural tourism destination.

Purpose

The Commission serves in an advisory capacity to the Mayor and the City Council on promoting, encouraging, and increasing support for the City of San Diego's diverse artistic and cultural assets, integrating arts and culture into community life and showcasing San Diego as an international cultural tourist destination.

The Commission also develops, administers, evaluates and/or recommends changes to public policy, legislation and advocacy strategies; facilitates partnerships; administers funding in support of nonprofit arts and culture organizations, artists, neighborhood arts programs, festivals, and artworks in public and private development; manages artworks owned and controlled by the City of San Diego; supports cultural tourism and innovative arts and culture programming; undertakes other initiatives that contribute to the quality of life, the economic vitality and the vibrancy of San Diego.

The Organizational Support Program (OSP)

Statement of Purpose

The Organizational Support Program (OSP) provides core support or general operating support for organizations whose missions and goals are substantially aligned with the City of San Diego Commission for Arts and Culture. These organizations foster the stabilization and diversification of San Diego's cultural base, enhance the quality of life in the city's neighborhoods and pursue the vision of San Diego as an international cultural tourism destination. Core support may be used not only for the delivery of services or other activities directly in pursuit of the organization's mission, but also for administrative and fundraising expenses (overhead).

The Diversity Commitment and the OSP Application Evaluation Process

Diversity and the inclusive environment that it engenders are core values of the City of San Diego Commission for Arts and Culture (Commission). This is a commitment shared by both the Commissioners and staff as it informs policies and practices and improves the Commission's ability to fulfill its mission. Diversity and freedom of expression are intrinsically connected; artists and arts organizations must be free to express diverse views, and people should be able to experience a wide range of artwork and cultural offerings.

As San Diego grows more diverse, the Commission realizes that in order for the arts and culture community to succeed in an increasingly competitive marketplace, becoming more inclusive – that is, engaging the full spectrum of the community in all aspects of an organization's culture and structure - is no longer just "the right thing to do" – it is also good business practice. These guidelines and application represent the Commission's attempt to establish diversity and inclusiveness as indicators of organizational excellence. That being said, in accordance with California Proposition 209, the City of San Diego Commission for Arts and Culture will not discriminate against, or grant preferential treatment to,

any individual or group on the basis of race, sex, color, ethnicity, or national origin in the operation of public employment, public education, or public contracting. Organizations are encouraged, therefore, to discuss what they are doing to promote, achieve and institutionalize a commitment to diversity in planning, programs, services, tracking, evaluation, etc. without actually reporting race, sex, color, ethnicity, or national origin numbers.

Applicants to the OSP may address how diversity, in all its dimensions, is realized as an organization-wide commitment. As it is applicable, this commitment may be evidenced throughout the application – in the mission statement, goals and objectives, the responses to the Narrative section, Participation Table and in the required and optional attachments. This discussion must, of course, be balanced with the discussion of all other criteria that attest to the applicant’s excellence.

Application review panelists will be instructed to look for evidence that the organization is aware of diversity and its benefits, that a commitment to diversity has been made and that steps to become more inclusive, if this is necessary, are being considered and implemented. Panel determinations of how well the commitment is being fulfilled can impact rank, given an applicant’s capabilities, relative to those of competing applicants of similar stature, budget size and discipline.

The Commission believes that building an inclusive organization is an exciting and rewarding process that takes time, commitment and intentional action toward the fulfillment of short and long range goals. Organizations that welcome this challenge and are ready to embrace diversity will be better positioned to grow and become more vital, which will ultimately benefit us all.

OSP Goals

1. To make fair and equitable recommendations to the City Council regarding all City funding decisions for arts and culture.
2. To support the artistic and administrative quality of artists and arts and cultural organizations.
3. To support opportunities for San Diego residents and visitors to develop throughout their lives knowledge of, skills in, and appreciation for arts and culture except as otherwise excluded by these guidelines.
4. To foster the vitality and stability of the City’s prominent and established arts organizations and cultural institutions.
5. To promote an environment that attracts and nurtures emerging artists and arts and cultural organizations.
6. To work in partnership with the City of San Diego and the private sector to promote San Diego as a cultural destination.
7. To expand the availability of arts and cultural activities throughout all social, ethnic and economic sectors of the City to foster, promote and expand cultural diversity.
8. To foster programmatic and organizational support for artists representing all cultural traditions and to increase the involvement of those artists and communities in the planning and implementation of arts and cultural activities.
9. To support the artistic and organizational growth and capacity of artists and arts and culture organizations.

Funding Source

Funding for the OSP is derived from the Transient Occupancy Tax (TOT). The purpose of the TOT is to advance the City’s economic health by promoting the City of San Diego as a visitor destination in the national and international marketplace. The TOT also supports programs that increase hotel occupancy

and attract industry, resulting in the generation of TOT and other revenue; it develops, enhances and maintains visitor-related facilities, and supports the City's cultural amenities and natural attractions.

Authorization

[Council Policy 100-03](#) provides a set of uniform guidelines, conditions and criteria governing the application for, and allocation of TOT funds to private nonprofit organizations for the purpose of supporting their ongoing operational expenses and/or their sponsorship of special events.

FY 2015 Guidelines

Link to Online Application: <https://sandiego.cgweb.org/>

All sections of the application must be submitted online. Nothing will be accepted by mail or any form of delivery other than the online application. The online application will also accept digital support media including images (jpg only), audio and video. Please follow the online instructions.

Versions of the Application: Long Form and Short Form

Applicants are categorized by the version of the application they are eligible to submit (Long Form or Short Form). The OSP Long Form is the standard form that all new applicants and returning applicants must submit.

The OSP Short Form rewards consistently high performing contractors with an opportunity to submit an abbreviated version of the application, saving preparation and processing time and money. Short Form Applications are not reviewed by a panel.

Organizations submitting Short Forms maintain the rank they earned the last time they submitted a Long Form.

After three (3) consecutive years of submitting a Short Form application, a Long Form application is required.

Short Form Eligibility

(Returning applicants only – All other must submit a Long Form.)

1. The applicant has satisfactorily completed City contracts over the most recent three (3) year period.
2. The applicant holds a rank of 3+ or higher.
3. Executive artistic and/or administrative staff has not changed during the past year.
4. The venue has not changed in the past year.
5. The average annual operating fund deficit for the two most recently completed fiscal years is not greater than 5%.
6. There have been no significant changes in program objectives as stated in the current year contract, and objectives have been met as outlined in the contract.
7. The contractor has successfully met all of its current (e.g. an Exhibit A for a contract and insurance documents) and prior year obligations, including Final Report Packets.
 - a. Current year Contract Components submitted by end of August
 - b. Prior year Final Report submitted by end of September
8. This would not be the 4th consecutive Short Form application submitted by the applicant.
(There is a 3-year limit to short form applications before a Long Form must be submitted again.)

Short Form Intent to Apply Deadline: December 31, 2013

All Short Form Applicants must submit an Intent To Apply which consist of completing the short form eligibility page of the application and sending an email to Gary Margolis (gmargolis@sanidiego.gov) for confirmation by December 31, 2013.

Application Deadline (Long Form and Short Form): January 31, 2014

Applications will be accepted through the online system only. No portion of the application will be accepted by mail or any other means unless requested by staff.

Late Submissions

No new or revised application materials will be accepted after the deadline unless requested by staff.

Disqualifying Omissions

Any omission of a required component of the application may be grounds for disqualifying an application.

California Cultural Data Project (CDP)

Applicants must complete CDP profiles for a minimum of two years, and the City of San Diego Commission for Arts and Culture Organizational Support Program Funder Report must be included with the application.

CDP website: <http://www.caculturaldata.org>

Complete instructions for getting started with the California CDP:

<http://www.caculturaldata.org/orientation.aspx>

Online training: <http://www.caculturaldata.org/training.aspx>

Private Information

Please remember that applications are public documents and as such are available upon request for the public to review. Please keep this in mind as you decide what kinds of information to include with your board and staff rosters.

Questions

Questions should be directed to Gary Margolis:

gmargolis@sanidiego.gov

619-236-6788

This publication can be downloaded from the Commission's website at

www.sanidiego.gov/arts-culture

The OSP Cycle

The complete OSP cycle is a multi-step process. Each step requires its own specific tasks and responsibilities. Below is a summary of the steps of which the applicant should be aware.

Steps leading up to an award

Technical Assistance

Workshops and Consultations: Applicants are encouraged to take advantage of technical assistance workshops and individual consultations provided by staff. Technical assistance provides new and returning applicants with guidance in the completion of applications, particularly in understanding eligibility requirements, procedures and policies. Receiving technical assistance does not guarantee funding or predetermine ranks.

New applicants, applicants that did not receive funding the last time they applied, and applicants that will be submitting a Long Form application after submitting one or more years of Short Form applications are strongly encouraged to attend a technical assistance workshop.

Site Visits

The Commission arranges, at its discretion, site visits with contractors and potential applicants. Usually conducted by Commissioners and/or staff before the application deadline, site visits provide applicants with technical assistance and an opportunity to discuss organizational challenges and opportunities with community experts.

Intent to Apply (Short Form Only)

All organizations planning to submit a short form version of the application must first complete the short form eligibility page of the online application and then email Gary Margolis to confirm their eligibility. Short Form applications from ineligible short form applicants may receive no funding.

Application

Applications must be complete at the time of submission and submitted by the deadline.

Staff Review

Staff reviews the applications for compliance with requirements and site visit reports (if any) and may pull applications from the review process for being ineligible or incomplete, for having significant discrepancies between the site visit report (if applicable) and the content of the application or if the organization has experienced significant organizational change since the application was submitted.

Panels

Applications are reviewed by panels which consist of Commissioners and members of the community representing diverse cultures, occupations and artistic disciplines.

Appeals

Applicants have the right to appeal the rank assigned to them by the panel if their appeal meets the eligibility requirements.

Funding Committee Review

After applicants have been given an opportunity to appeal a ranking decision, ranks are finalized and awards are calculated. The Commission's Funding Committee reviews the ranks and a funding scenario prepared by staff. Applicants receiving the highest ranks receive the highest percentage of their

request, applicants at the next level receive a lesser percentage, and so on, until available funding is exhausted.

Commission Review

The Funding Committee will submit a funding recommendation to the Commission's Executive Committee, then to the full body of the Commission.

Mayor and City Council Approval

The final approval of the funding recommendation is the responsibility of the Mayor and City Council; this approval takes place during the City Council's budget deliberations.

Award Notification

After the Mayor and City Council have approved the Commission's funding recommendations, staff will notify each applicant by mail or electronically.

Steps after an award is offered

Contracts Workshop

Early in the fiscal year, staff will conduct a workshop to instruct award recipients what is required to complete a contract with the City. At this workshop, contracts will be distributed to attendees. Contracts will be mailed to organizations that did not attend the workshop. The contract includes terms and conditions and the organization's scope of work and budget. The City reserves the right to reduce or terminate for convenience any and all contracts.

Requesting Funds

1. OSP funding is provided through a contract for service process.
2. All funds are awarded on a cost reimbursement basis. There can be no payment in advance.
3. Requests for payment shall be submitted no more than one (1) time per three-month period unless approved by the Contract Administrator.
4. Submission of a Request for Payment form is required.
5. Documentation of expenses and match may be required.
6. Payments may be withheld until all prior year and/or current year requirements are met. Failure to comply with City financial disclosure requirements may negatively impact your rank and may cause the withholding of current or future funding until all financial disclosure documents are received.

Final Performance Reports

The Final Performance Report details how the program objectives outlined in the contract were met and how they were measured. Final reports are due within 90 days after the contract's closing date.

Eligibility & Other Requirements

To be eligible, the applicant organization must meet the following requirements derived in part from Council Policy 100-03:

Nonprofit Status

All applicants, including fiscal sponsors, must demonstrate proof of nonprofit tax-exempt status under Section 501(c)(3) or 501(c)(6) of the Internal Revenue Code.

Primary Mission and Budget Priority

The applicant's mission must be strongly aligned with that of the Commission and may include the creation, preservation and presentation of arts and culture programming and/or support services. The majority of the applicant's income must be used for the purpose of fulfilling its mission.

Track record

The applicant must have a three (3) year history of ongoing arts and culture programming within the City of San Diego prior to the OSP deadline.

Location

At least 75% of the applicant's core programming must take place within San Diego City limits. For the purposes of this application, core programming is defined as the artistic and/or cultural activities produced or presented by your organization that are essential to the fulfillment of your mission and purpose, your highest priority, and fundamental to your organization's sustainability. With some exceptions, core programming does not include education, outreach, touring and cultural tourism marketing activities.

Matching Requirement:

All successful applicants must provide a \$3 cash match for every \$1 the City provides. The cash match may be from private contributions, other local, state or federal government or earned income. Commission funding cannot be used as a cash match.

State of California Good Standing

Applicants must be in good standing with the Secretary of State, the Attorney General and Franchise Tax Board. All required filings must be current and the status of the corporation must be active. "Active" status means that your corporation has not been dissolved, suspended, surrendered or forfeited.

Debarment Status

Any organization debarred from entering into contracts with any government entity cannot enter into a contract with the City of San Diego.

City of San Diego Good Standing

Current and former contractors must have submitted all required paperwork by the applicable deadlines. Examples of required paperwork include current contract initiation components (Exhibit A, insurance documents, etc.) and acceptable Final Report packages on completed OSP contracts. Review panels will be provided with and instructed to give consideration to information related to applicants not in compliance with current and/or prior contracts. In addition, organizations awarded funding are subject to forfeiture of their award if all contract requirements are not submitted by the deadline(s) set forth in the award letter and/or contract.

Dun & Bradstreet Data Universal Numbering System (DUNS) Number

Applicants are required to have an active DUNS number.

For more information:

(866) 705-5711

http://www.dnb.com/US/duns_update/index.html

Limitation on Applying for Transient Occupancy Tax (TOT) Funds

Organizations applying to the City for TOT funds may submit only one application per year. Possible sources of TOT funding include the Commission's two programs (CCSD and OSP) and programs administered by the Financial Management Department and the Community and Economic Development Department.

California Cultural Data Project (CDP)

All applicants to the OSP must have entered a minimum of two years' worth of data into the CDP and included the Funder Report for the City of San Diego Commission for Arts and Culture as part of the application. Applications submitted with a "draft" watermark on the CDP Report will be deemed ineligible for funding. Please note that ALL sections of the CDP profile are REQUIRED, including Section 8, the Balance Sheet. The only exception to this rule is Section 2 (audit verification) is not required for unaudited organizations. The applicant should also be aware that the CDP reviews all data submissions and may contact you regarding possible errors. Applicants, therefore, should plan to complete their CDP profile at least two weeks prior to the application deadline.

Council Policy 100-04 (Americans with Disabilities Act)

Contractors will comply with Council Policy 100-04, adopted by Resolution No. 282153 relating to the federally mandated Americans with Disabilities Act (ADA). Contractors and subcontractors will be individually responsible for their own ADA program.

Council Policy 100-17 (Drug-Free Work Place)

Contractor agrees to comply with Council Policy 100-17, which establishes that all City contractors must provide a drug-free work place and a drug education program for all employees.

Title VII (Non-Discrimination)

Contractors will comply with Title VII of the Civil Rights Acts of 1964, as amended; the California Fair Employment Practices Act; and any other applicable federal and state laws and regulations hereinafter enacted, as well those requirements addressed by the City's Non-discrimination in Contracting Ordinance (Municipal Code Section 22.3401-22.3417).

Fair Labor Standards

Applicants must comply with Fair Labor Standards and compensate professional performers, artists and other personnel at the prevailing local compensation level.

Equal Benefits Ordinance

Applicants must comply with the City's Equal Benefits ordinance which requires employers to offer the same employment benefits to employees with spouses and employees with domestic partners.

Visual Art in Public Places

Proposals for such projects, both permanent and temporary, must follow the Public Art Program policies and procedures.

Acknowledgement of City Funding

All organizations awarded funding through the OSP program must acknowledge the City of San Diego Commission for Arts and Culture according to guidelines set forth in the Commission's Acknowledgement Policy. Copies of this document are available from the [website](#).

Financial Statements

Financial disclosure information is required of all funding recipients. Organizations receiving funding shall provide the Commission, each year, copies of true, accurate and complete financial disclosure documentation evidencing the financial status of the organization's last complete fiscal year within 90 days of the end of that fiscal year.

Audits

If City funding is \$75,000 or greater, audited financial statements must be prepared in accordance with generally accepted accounting principles (GAAP) and audited by an independent Certified Public Accountant, in accordance with generally accepted auditing standards (GAAS).

Insurance Requirements

All Contractors must maintain the following:

Commercial General Liability Insurance

\$1,000,000 per occurrence; \$2,000,000 aggregate.

A separate Additional Insured Endorsement page (CG 2010, CG 2026 or equivalent) naming the City of San Diego, its respective elected officials, officers, employees, agents and representatives as additional insured on your insurance should be referenced on the ACORD certificate and endorsement page and should be submitted as well.

Auto Liability Insurance

\$1,000,000

A separate Additional Insured Endorsement page naming the City of San Diego, its respective elected officials, officers, employees, agents and representatives as additional insured on your policy should be referenced on the ACORD certificate and endorsement page and should be submitted as well.

In the event that a Contractor does not currently own any vehicles AND the contractor has obtained, and shall maintain during the term of the Agreement, automobile insurance coverage for "hired autos" and "non-owned autos," the contractor may complete and submit an "Auto Declaration Form" and is not required to purchase "Any Auto" automobile insurance. This form is available from the website.

Workers' Compensation Employer's Liability Coverage

\$1,000,000 in coverage for all staff employed under the agreement

A separate Certificate waiving the Right of Subrogation should be referenced on the ACORD certificate and Right of Subrogation page should be submitted as well. Note: State Fund Right of Subrogation will not appear on the ACORD certificate.

If a contractor has no paid employees, the contractor may complete and submit a "Workers' Compensation Waiver."

Contracts will not be signed by City of San Diego officials until all insurance requirements are in place.

Contact Teresa Monillas, contracts coordinator, for more information about insurance requirements:

tmonillas@sandiego.gov

619-236-6803

What We Do Not Fund

Under these guidelines, funding is not available for:

Ineligible Applicants

- Universities, community colleges, school districts, and private educational enterprises
- Organizations whose primary purpose is grant making
- Commercial (for-profit) enterprises
- Organizations that receive TOT funds through the City's "Economic Development" categories as defined in Council Policy 100-03. These include funds administered by the Financial Management Department and the Community and Economic Development Departments
- Individuals

Ineligible Expenses

- Anything occurring outside the applicable fiscal year
- Programs not accessible to the public
- Programs not accessible to people with disabilities
- Travel, meals, lodging or entertainment expenses
- Hospitality or food costs
- Capital or equipment outlay
- Competitions, contests, pageants or awards programs to honor or recognize achievement including awards, trophies, or gifts
- Uniforms
- Programs with religious, sectarian or political purposes
- Activities taking place in schools, during normal school hours unless they are part of a broader project that includes out-of-school activities
- Activities that are the curricula base of schools, colleges or universities
- Trust or endowment funds
- Cash advances, deposits or the replacement of deficit funds
- Ticket subsidy programs

How Awards are Determined

Step 1: Panel Review

A Commission Advisory Panel (CAP) composed of community experts and Arts and Culture Commissioners reviews OSP applications. The panelists evaluate all applications individually and as a group. They consider each applicant's:

- Current and past contractual performance (if applicable).

- The appropriateness of the program goals and objectives given the organization’s mission statement.
- Quality of the responses to the review criteria, previous panel comments and other sections.
- Strength of collateral and support materials.

The application review process takes place in two rounds. In Round One, panelists vote according to a four-point ranking system described below. The ranks are then averaged for an initial score. In Round Two, applicants are clustered by rank from the highest to lowest rank. Rank adjustments may take place when the panel finds an applicant out of place within the cluster. Panel comments and rank recommendations will be mailed to applicants. The applicant may appeal its rank if it meets one of the criteria.

Four Point Ranking System

The Ranks of 4 (4+, 4 and 4-)

The ranks of 4 and 4- designate an applicant as the highest priority for funding. Applications ranked “4” are considered to be “model” in stature; and given the nature of the arts discipline or genre, and the resources of the community, etc. meet all the review criteria to the highest degree possible.

If there are no “model” applications, no “4” rankings should be given; this is not a grading curve but a rarefied achievement of near perfection given the criteria.

The Ranks of 3 (3+, 3 and 3-)

The ranks of 3 (3+, 3 and 3-) are considered good. Some improvements or development are needed.

The Ranks of 2 (2+, 2 and 2-)

The ranks of 2 (2+, 2 and 2-) are considered marginally fundable. Funding, if available, may be awarded once all the “4” and “3” ranked applications are awarded funding. These applications have some merit, but do not meet the criteria in a strong or solid way.

The Rank of 1

The rank of 1 is not fundable under any circumstance; inappropriate for Commission support, extremely marginal in quality, etc. This application would not receive funding even if the funding were available. Ineligible applications, such as those submitted after the deadline or with incomplete information, will not be reviewed by the CAP, but will receive a rank of “1”.

Ranks and Funding

No rank is assured of funding. In any given year, the Commission may recommend to fund ranks of, for example, 2+ or better, 3- or better, 3 or better, etc.

Recommendations are not final until they have been approved by the Mayor and City Council.

Step 2: Appeals Process

(if necessary)

Written appeals may be made after the preliminary ranking and notification period. In a public hearing, the Commission’s Executive Committee considers appeals and makes recommendations to the full Commission.

Comments from the panels will be divided into two categories :

1. Material comments are those comments that evaluate the extent to which an applicant has met one or more of the stated criteria. These comments impact the rank a panelist assigns to an application.
2. Non-material comments do not directly evaluate the extent to which one or more criteria have been met. These comments might be suggestions related to how an applicant might improve or they might be questions asking for clarity or for additional information in a subsequent application. These comments may not be used by a panelist in the assignment of a rank.

Applicants will be permitted to appeal material comments only that they can prove are incorrect given what was submitted in the application.

Applicants may also appeal a rank if they can prove one or more Commission staff errors that negatively influenced the panel's evaluation of the applicant's request for funding.

Note: Dissatisfaction with an application's denial or ranking is not sufficient grounds for an appeal. The appeals process is not a forum for correcting information that was incorrectly stated in, or omitted from, the application.

Step 3: Calculation of Funding

The Commission uses a formula to determine funding recommendations. The formula includes guidelines such as:

- Applicants receiving the highest ranks receive the highest percentage of their request; applicants at the next level receive a lesser percentage, and so on, until available funding is exhausted.
- Funding to a single organization will not exceed 10% of total available funds.
- New or returning applicant funding may be adjusted to 50% of the computed allocation the first year and 75% the following year.
- When an allocation computes to less than \$1,500, awards may be increased to a \$1,500 minimum.
- Overall decreases and increases may be capped.

Step 4: Funding Committee

After the appeals process has been completed, final ranks and funding calculations are forwarded to the Commission's Funding Committee for review. The Funding Committee makes funding recommendations based on panel rankings and other criteria determined by the Commission.

Step 5: Executive Committee

The Funding Committee's recommendations are reviewed by the Commission's Executive Committee which then forwards its recommendations to the full Commission.

Step 6: Full Commission

The full Commission reviews the entire process and makes its recommendations to the Mayor and City Council.

Step 7: Mayor and City Council

The Mayor and City Council have the final responsibility for approving all funding.

Contingent Nature of Funding

In the event that funding for OSP is reprogrammed or reappropriated in whole or in part, upon recommendation by the Mayor and approval by the City Council, funding may be terminated or reduced.

Panel Handbook

A complete description of the panel review process and of the Funding Committee is located in the Commission [Panel Handbook](#).

Amount You May Request

The amount you may request (amount requested) is based on an organization's annual operating income (AOI) from the most recently completed fiscal year at the time of application and a percentage of one's AOI that can be found in the application. Certain categories of revenue and expense are not allowed (see below). The application has a page that will walk you through determining this amount. Because awards are calculated as a percent of the amount requested, applicants should always request the maximum amount allowable.

Annual Operating Income - Definition

The AOI is an applicant's total Financial Accounting Standards Board (FASB) unrestricted income exclusive of the following:

- Temporarily and permanently restricted income
- In-kind donations
- Value of collections
- Unrealized capital or investment gains, losses, and income
- Any income that was used for fixed assets (property or equipment) or capital improvements

Link to Online Application: <https://sandiego.cgweb.org/>

Long Form Application Checklist (All Levels)

- The Complete Online Application
- Required Attachments (submitted via the "Work Samples" Page of the application)
 - ✓ Key Staff Roster and Short Bios (dated)
 - ✓ Board Roster and Short Bios (voting members clearly indicated and dated)
 - ✓ Articles of Incorporation (new applicants only)
 - ✓ Certificate of Tax-Exempt Status (new applicants only - submitted via the "Eligibility" Page of the application)

- Non-required Attachments

Applicants are highly encouraged to support and substantiate statements made in their application with credible, relevant and current documentation. All support material will be submitted via the "Work Samples" Page of the online application. Each applicant is limited to 250 MB total for all attachments.

Please read the online instructions carefully. Non-required attachments may include the following:

- ✓ Plans, for example strategic, diversity, debt reduction, etc.
- ✓ Program information, such as teacher guides, student guides, sample curricula or lesson plans, sample evaluation instruments (no more than 3 samples)

- ✓ Recent critical reviews or feature articles (no more than 3 clippings, no older than 3 years (10 years for national publications) with dates clearly indicated)
- ✓ Support letters (no more than 3)
- ✓ Digital versions of programs or brochures (no more than 3 samples)
- ✓ Selections from and/or images of publications
- ✓ Audio-visual materials

Websites

Applicants that would like panelists to view sections of their website in support of comments made in the narrative should do the following:

1. At a maximum of three places in the narrative where an applicant believes a page of the website will provide added value to an understanding of that section, in parentheses type: (Website Example 1, Website Example 2, Website Example 3). Of course, when you do this, you're only typing one "Website Example #" at a time. So the first time, you have a website example, you'll type (Website Example 1). The second time you have a website example, you'll type (Website Example 2), and for your third example, you will type (Website Example 3).
2. Create a pdf document in the Work Samples Page of the application and title it "Links to Website." In that document, you may identify a maximum of three specific web addresses, a brief description of what will be found there, and a brief description of why the referenced website section is relevant to a better understanding of the narrative section. Panelists have the option to view websites or not, so applicants should not use their website examples as a substitute for complete narrative answers.
3. Attach that document to your application using the "Work Samples" Page.
4. PLEASE NOTE: If you send a reader to a page that they have to download in order to read or view (as opposed to a webpage), the size of that file will be included in your 250 MB total. Do not do this. The purpose of this supplemental support option is to feature your website – not to take the reader to documents, images or other files on your website that must be "opened" to view.

Short Form Application Checklist (All Levels)

Only the following pages from the online application are required.

- Short Form Eligibility
- Basic Information
- Outreach and Inreach Table
- Schools
- Calculating AOI
- AOI Notes
- Goals and Deliverables
- Contacts
- CDP Funder Report (Attachment)

Contact Gary Margolis if you have questions: gmargolis@sandiego.gov

Definitions

ACCESS (See EDUCATION AND ACCESS PROGRAMS)

ACCREDITATION

The following characteristics of an accreditable museum reflect the core values and concepts of the American Association of Museums Accreditation Program:

An accreditable museum has a clear sense of mission and organizes its governing authority, staff, financial resources, collections, public programs and activities to focus on meeting its formally stated mission.

The accreditation is predicated on the expectation that each museum complies with all local, state and federal laws, codes and regulations applicable to its facilities, operations and administration. These laws include, but are not limited to the following: the Americans with Disabilities Act (ADA); Equal Employment Opportunity (EEO); and Native American Graves Protections and Repatriation Act (NAGPRA).

ANNUAL OPERATING INCOME (AOI)

Annual Operating Income is a number derived from an organizations unrestricted income and is one of the variables used by the Commission to calculate funding levels. The application contains a page to help you calculate AOI.

ART

The arts include dance, design art, folk and traditional art, literature, media arts, music, opera, musical theatre, theatre and visual arts. As applied to the funding process, art is the development and presentation of artistic elements in a manner that reflects levels of quality, accessibility, diversity and financial stability.

ART IN PUBLIC PLACES

The Commission's Public Art Program supports artist involvement in the design and construction of facilities sited on City property and projects with an emphasis on visual art; reviews proposed donations of artwork to the City; and assists private property owners and others in the selection and installation of artworks to be located in the public view.

ARTS AND CULTURE EDUCATION (See Education and Access Programs)

AUTHORIZED SIGNATORY

Dependent on the type and size of an applying organization, the authorized signatory may be the board president, executive director, program administrator, or any person who has direct contact with management or administration of the organization and who will be responsible for all requirements of the Organizational Support Program.

CERTIFICATE OF GOOD STANDING

The Certificate of Good Standing (Certificate of Status/Domestic Corporation) documents the organization as a legal entity in good standing as required by City Council Policy 100-03.C.4.

CITY COUNCIL DISTRICTS

There are nine (9) City of San Diego Council Districts. A minimum of 75% of your core programming must occur in one or more Council District(s). As organizations grow in size they are expected to expand their services into more City Council Districts. Refer to the San Diego City Council website to find the council district(s) where you operate: <http://www.sandiego.gov/citycouncil/>

COMMUNITY

A unified body of individuals; people with common interests living in a particular area; the physical boundaries of an area; a group of people with a common characteristic or interest living together within a larger society; or the society at large.

CONTRACT FOR SERVICE

The Commission contracts services, rather than awards grants, to arts and culture organizations. The contract details the terms of the agreement between the contractor and the City and describes the specific scope of services arts and culture organizations are contracted to provide.

CORE SUPPORT

Core support is funding for the ongoing costs that are central to an organization's mission.

CULTURAL TOURISM

Travel with a primary purpose to experience the arts, heritage, cultures, or special character of a place.

CULTURE

Culture is the total array of a transmitted heritage characteristic of a people. Cultural organizations are those devoted to the fine arts, humanities and broad aspects of a science distinguished from vocational, recreational and technical skills. As applied in the funding process, culture includes those institutions and groups dedicated to preserving and exhibiting some aspects of our culture, including art, architecture, science and history.

DANCE

Dance includes ballet, modern and experimental, jazz, ethnic dance and dance instruction.

DIVERSITY

Diversity refers to differences in race, gender, ethnicity, age, socioeconomic class, religion, sexual orientation, skills and abilities, and politics among other qualities. It can be described in a multitude of ways, some less visible than others; this by no means excludes a particular category. "Cultural Diversity" can be described as the values, practices, patterns and customs of a group of people or society.

DUNS NUMBER

Dun and Bradstreet (D&B) is a company that provides business information for credit, marketing, and purchasing decisions. Its "data universal numbering system," known as DUNS, issues unique 9-digit numbers that are used by businesses and the federal government to keep track of more than 70 million businesses and individuals world-wide. Some entities, such as states and universities, will also have what is known as "DUNS + 4," which is used to identify specific units within a larger entity.

EDUCATION (See Education and Access Programs)

EDUCATION AND ACCESS PROGRAMS

Education and access programs are those activities that an organization implements designed to make arts and culture more accessible and relevant to all San Diegans.

Sometimes this goal is accomplished through “access programs” – those programs targeted at changing “things,” for example, the price of a ticket, hours of operation, location of facilities, availability of transportation, language of signs, ramps for wheelchairs, etc. Sometimes this goal is accomplished through “educational programs” – those programs targeted at changing or developing “people,” for example programs designed to increase appreciation of an art or cultural form, programs designed to change the attitudes of board members and/or staff toward diversification, programs designed to increase the skills of staff to manage nonprofit organizations or to effectively serve diverse constituents, training in specific arts or culture disciplines in order to develop future artists and audiences, arts education programs for all ages, etc.

ENDOWMENT

Endowments are funds that are kept permanently and invested to create income for the organization.

ETHNIC

Ethnic refers to groups within a cultural and social system that claim or are accorded distinction on the basis of variable religious, linguistic or ancestral characteristics.

FAMILIARIZATION TOUR

Destination inspection tour designed to increase product knowledge, develop new products and build future sales. “Fam Tours” are complimentary or reduced-rate group programs often coordinated by the San Diego Convention and Visitors Bureau for the purpose of educating the tourism industry with the arts and culture industry and vice versa.

FASB

Since 1973, the Financial Accounting Standards Board (FASB) has been the designated organization in the private sector for establishing standards of financial accounting and reporting. Those standards govern the preparation of financial reports. They are officially recognized as authoritative by the Securities and Exchange Commission (Financial Reporting Release No. 1, Section 101) and the American Institute of Certified Public Accountants (Rule 203, Rules of Conduct, as amended May 1973 and May 1979).

HUMANITIES

Humanities programs and organizations contribute to the public understanding and appreciation of the humanities, history, art history, criticism, literature, philosophy, folklore and related fields.

INKIND CONTRIBUTIONS

In-Kind contributions are the value of goods or services donated to the applicant either as volunteer staff time or goods donated by vendors at no cash expense to the applicant.

INREACH

The attendance by groups of people coming to any venue owned, rented or otherwise controlled by an organization from any of the City’s Council Districts.

LITERARY

Literary organizations promote literature through readings and workshops as well as the development of small presses, which publish and distribute works of local, national and international writers.

LOCAL AUDIENCES

Those people living within fifty (50) miles of an event site attending the event as spectators (as opposed to participants.)

MATCHING FUNDS

Every dollar of City funding must be matched by three dollars of an organization's earned and/or contributed income.

MEDIA ARTS

The production, exhibition, distribution, and preservation of film, video, audio and online/multimedia arts.

MUSEUM

A museum strives to preserve some aspect of culture, be it artistic, scientific or historic. A museum educates a people, instilling in them an understanding and appreciation of their world and serving as a permanent repository for their cultural artifacts. The support and use of museums are hallmarks of culturally mature people. A museum is devoted to the procurement, care, study and display of objects of lasting interest and value. It has regular business hours and is open to the public.

MUSIC

Music includes the production of or training in opera, vocal ensemble, orchestras, chamber music, jazz, contemporary and early music, concert and wind ensembles, and ethnic music performance.

NEIGHBORHOOD

The geographically defined area within the City of San Diego where programs and services are provided. The boundaries of neighborhoods or regions may be defined by police, city maps, council districts or the residents themselves.

ORGANIZATIONAL SUPPORT

Funding restricted for the cost of administering or operating an arts and cultural institution to carry out its programming.

OUTREACH

Programs and services implemented at locations other than an organization's primary location, including those locations that are owned or rented and those that are not owned or rented by the applicant.

QUALITY

Quality is the result of high intention, sincere effort, intelligent direction and skillful execution; it represents the wise choice of many alternatives.

RANKING SYSTEM

Rank has meaning in terms of an applicant's funding request. For a more detailed account of the ranking and panel process on which your application is judged.

SERVICE ORGANIZATIONS

Service or trade associations for specific arts disciplines provide members with general management support, resource networks and philanthropic advocacy.

STRATEGIC PLANNING

Exploring alternatives (before they are implemented) and improving performance by adopting strategies to meet certain short and long-range goals.

THEATRE

Theatre includes all professional, community, experimental, children's theatre productions/organizations, and script and production development projects.

TOURIST

A person who travels more than 50 miles or is traveling from Mexico to visit San Diego and/or someone who stays overnight

TRANSIENT OCCUPANCY TAX

The transient occupancy tax is a 10.5% City of San Diego tax on hotel/motel rooms and is governed by City Council Policy 100-03.

UNDERSERVED

Underserved is defined as those who currently do not have full access to arts and cultural experiences, including multicultural groups, senior, children, differently-abled, institutionalized or those with financial constraints.

VISUAL ARTS

Visual arts refers to projects or organizations that are originated for the exhibition and documentation of the visual arts, both historical and contemporary, to further artist's interests and in general, to encourage groups that present, create or serve all aspects of the visual arts.

The City of San Diego Commission for Arts and Culture receives financial support for some of its programs from the National Endowment for the Arts and the California Arts Council.